**BEYOND THE CODING Exploring & Visualizing Data in NVivo: Donna Ziegenfuss (**[donna.ziegenfuss@utah.edu](mailto:donna.ziegenfuss@utah.edu) **)**

| **Strategy/Tool** | **What** | **Why** | **When** | **Where** | **How to & Tips** |
| --- | --- | --- | --- | --- | --- |
| **Strategy** Memoing and Annotations | * **Helps you keep reflective memo notes, and record insights you have and keeps “your thoughts” separate from the imported text** * **You can import notes from word or Evernote and make them part of your project or link memos directly to sources (only one memo per source)** * **Annotations are notes but on specific content (works like a comment features in word)** | * **As you code or get ideas about your research it is important to document as you go, if you don’t you will forget** * **You can code your own thoughts from memo docs and use that to triangulate what you are seeing or use your memo codes to make sure you have not missed anything.** * **Annotations can help you track problems in your transcripts, tag words for further investigation** | * **Can memo on nodes, sources, etc** * **can set up a folder of unlinked research progress memos that can be coded** * **You can memo a node as you get ideas about connections and relationships as you are coding** * **Use memos to record insights from queries** * **Annotations can be searched but not coded** | * **Memo folder (navigation menu) – you can add subfolders and organize by drag and drop** * **To see annotations you have added in the project: go to Collections (navigation menu) and click on annotations to see all of your annotations** * **In the VIEW menu you can toggle on and off annotations** | * **You can add pictures as well as text to memos (like a wordle or word tree)** * **When in a source or node if you right click that will add a memo to that document.** * **To add an annotation you must first select something to annotate and then add an annotation** * **One memo per document but can have many annotations** * **Import from Evernote – EXTERNAL DATA menu – From Other Sources** |
| **Strategy:** Queries: Word Frequency and Text Search  **Tools:** tabs to see word cloud, cluster analysis, distribution across documents | * **Finds the most frequently used words used, or** * **Finds all places text is used** | * **Look for words that might be used as Nodes (codes)** * **Look to see where words appeared in different sources** | * **In the beginning of your project to look for commonly occurring words** * **As you are coding and looking for words to refine node names** * **As you are writing – look for quotes containing words** | * **QUERY Menu - Text Search and Word Frequency Query** * **After you run the word frequency – use the right tabs to see word cloud, cluster analysis** * **After you run the text search use tabs to search different source types** | * **Check the *Add to project box* so you can go back and rerun and edit** * **Experiment with the exact/similar slider to find synonyms** * **Use tabs to see different representations** |
| **Strategies & Tool:** Queries: Coding | * **Simple coding queries – to look at one node with some classification categories** * **Advanced code queries – to look at multiple nodes and classifications** | * **If you want to tease out some particulars about a node (like looking only at age or gender comments)** | * **Use after you code (coding queries only find text that has been coded)** * **Can help when writing to look at some more specific information or frequency numbers** | * **Query Menu and click on coding and make a decision simple or advanced** * **Select classification criteria to limit** | * **Check the *Add to project box* so you can go back and rerun and edit** * **You can make any coding query you run a new node** |
| **Strategies & Tools:** Queries: Matrix, Compound | * **Matrix: Lets you look at frequency numbers of coding that is cross compared with classification criteria or other source material** * **Compound: combining different types of queries (ex. A text search query and a coding query)** | * **Matrix: To help you see patterns in the data that will help you make connections in the text** * **Compound: I use this most often to find particular text across nodes** | * **During analysis of the text** * **You really cannot do this type of query until you know what you are looking for – Decide what you want to know and then select the appropriate type of query** | * **Query Menu and click on matrix query or compound query** | * **Once the matrix is created you can add color to see patterns better, change from frequency to percentages and other number values** * **Can click in each cell to see the associated data** * **You can export to excel** |
| **Strategy & Tool**: Framework Analysis | * **This is just a matrix where you can pull data in or summarize so you can compare (rows – case nodes/interviews etc) and columns theme nodes (codes)** * **It shows all of the text that has been coded for a node but in a spreadsheet format (which you can export into excel)** | * **Sometimes it is helpful to see things in one screen (ex looking at all the coded nodes for one interviewee to see relationships or connections)** * **Lets you see the intersection of sources and nodes easily** | * **After you are finished coding and want to start the analysis of codes** * **As you are writing might help too to see nodes across people or a person with related nodes** | * **When you create a framework matrix it is stored under the Source (navigation menu) – you will see a framework matrix folder You can right click and add a new one** * **To Auto Summarize: With the framework open, go to ANALYZE menu and click on Auto summarize (far right)** * **Each summary you create is a separate file that is pulled in a matrix (so can use one summary in multiple matrices)** | * **To create a blank map:** * **You need to open a blank framework and then populate with what you want to compare** * **You can click on blank cells and summarize or automatically summarize** |